

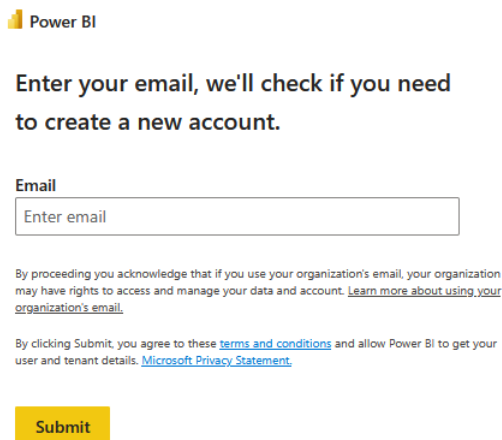
# New to PowerBI and PowerBI apps? Start here!

## WHAT IS Power BI and why do I need this app?

Power BI stands for Power Business Intelligence and refers to a set of software tools and connectors that help transform data from multiple sources into actionable insights through data gathering and then visualization. The MU Capital Plan Power BI app allows Business & Finance Officers (BFO's) to gather information from various sources in the unit related to capital improvements (building projects) being considered while still in the financial planning stage. The BFO then shares information with the Division of Finance to collectively understand university wide financial plans regarding future expenditures to flow into the Long Range Financial plan.

## Get PowerBI

Users can get Power BI through a direct browser link ([app.powerbi.com](http://app.powerbi.com)). Users may be prompted to enter their University credentials when accessing Power BI. Be sure you are logged in to Microsoft 365.



The screenshot shows the Power BI sign-up interface. At the top left is the Power BI logo. Below it, the text reads: "Enter your email, we'll check if you need to create a new account." There is an input field labeled "Email" with the placeholder text "Enter email". Below the input field, there is a small disclaimer: "By proceeding you acknowledge that if you use your organization's email, your organization may have rights to access and manage your data and account. [Learn more about using your organization's email.](#)" Below the disclaimer, there is another line of text: "By clicking Submit, you agree to these [terms and conditions](#) and allow Power BI to get your user and tenant details. [Microsoft Privacy Statement](#)." At the bottom of the form is a yellow "Submit" button.



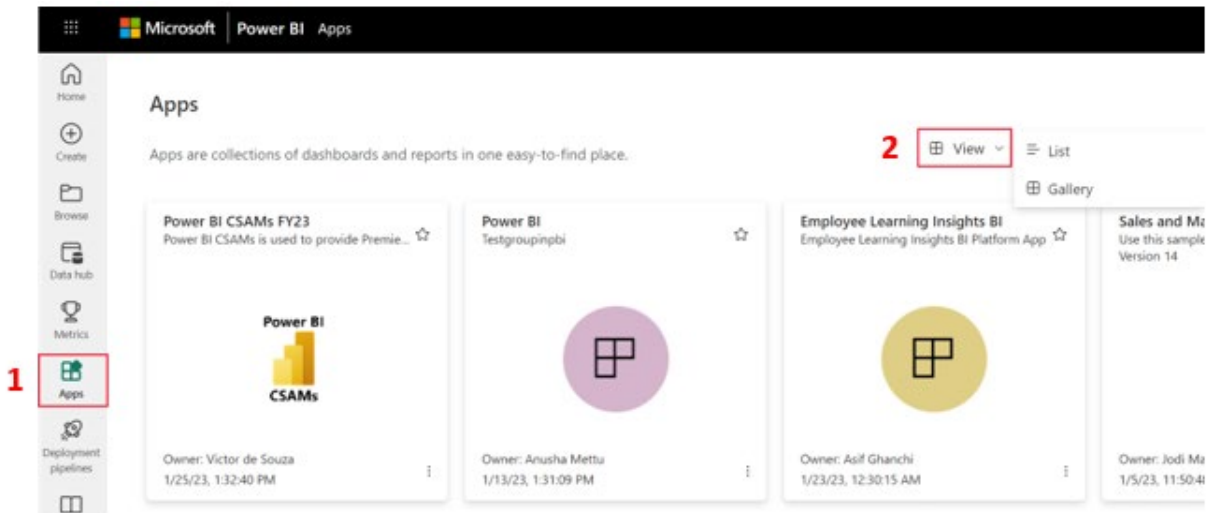
## I have PowerBI – now what?

The following sections cover:

1. Accessing the app
2. Navigating the app
3. Exporting Data
4. App support

## ACCESSING the app

After logging into Power BI, users will see the Power BI Home screen. Select **Apps** from the navigation pane on the left (see box 1). The first example below shows the App page view set to **Gallery**. You can select **View** and then choose **List** to see your apps as a list instead of tiles (see box 2).



Next, select the **MU Capital Plan** app tile (or from the list) to open existing reports in Power BI.

### Apps

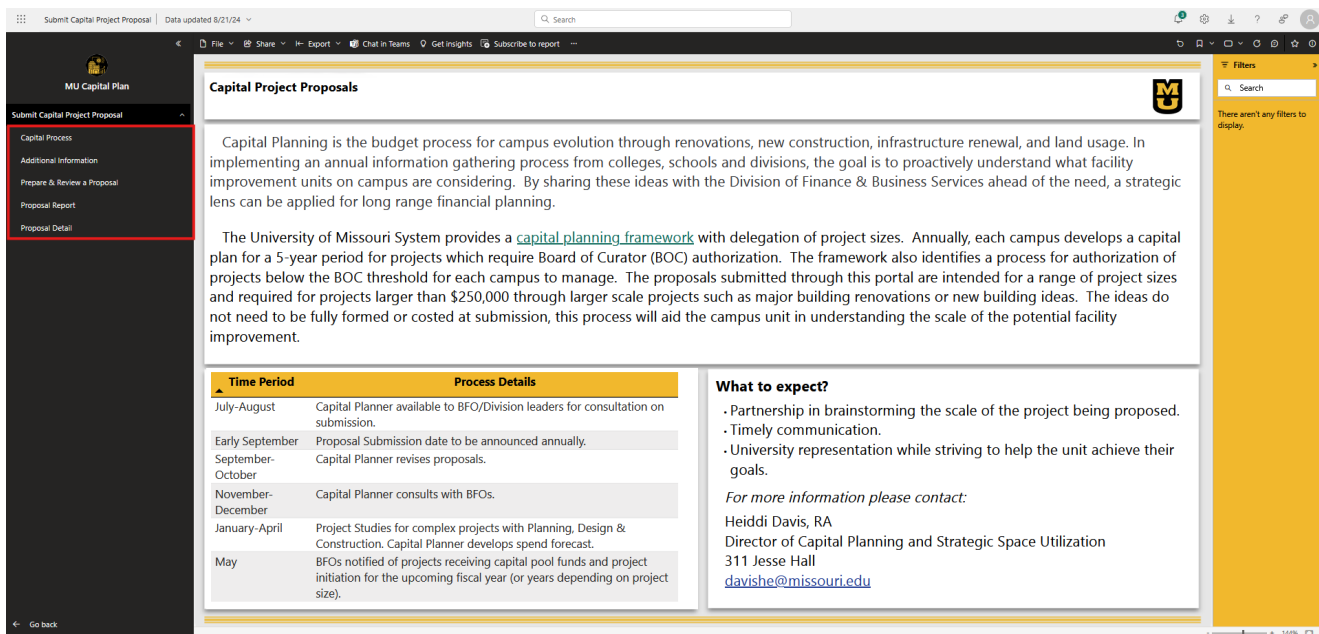
Apps are collections of dashboards and reports in one easy-to-find place.

Name	Publisher	Published ↓	App type
MU RII Research Analytics - Production	Sabrina Woo	8/20/24, 1:41:12 PM	Org app
MU Capital Plan	Kristen Marlin Horst	8/20/24, 9:37:32 AM	Org app

## NAVIGATING

Users should now see a screen like the image below. The navigation pane on the left side of the screen different pages and reports: **Capital Process, Additional Information, Prepare & Review a Proposal, Proposal Report, and Proposal Detail.**

The first two pages, **Capital Process/Additional Information**, provide information about the proposal process. At the **Prepare & Review a Proposal** page, users can submit proposals to their corresponding BFO. The BFO can prepare and submit proposals from the same **Prepare & Review a Proposal**, and the app design includes workflow allowing BFO's to submit, delete, or return to sender with comments. The last two are options on the list are reports, **Proposal Report/Proposal Detail**, which allow users and BFO's to review project data from predeveloped visualizations (Proposal Report) or export the information to present in other ways (Proposal Detail).



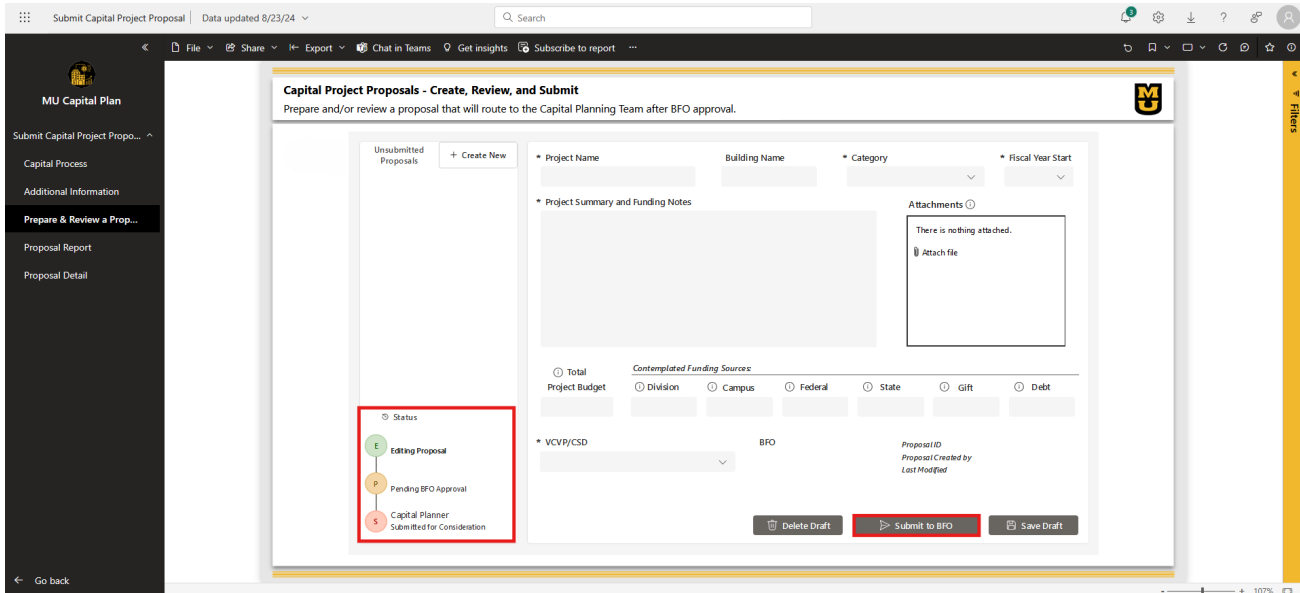
When submitting a proposal under the **Prepare & Review a Proposal** page, users should remember to complete all required fields, which are highlighted in red below (denoted by \*), and provide any information which will assist their BFO as they review this proposal (e.g. building name, budget, attachments).

The screenshot displays the 'Capital Project Proposals - Create, Review, and Submit' web application. The main content area contains a form with the following fields and sections:

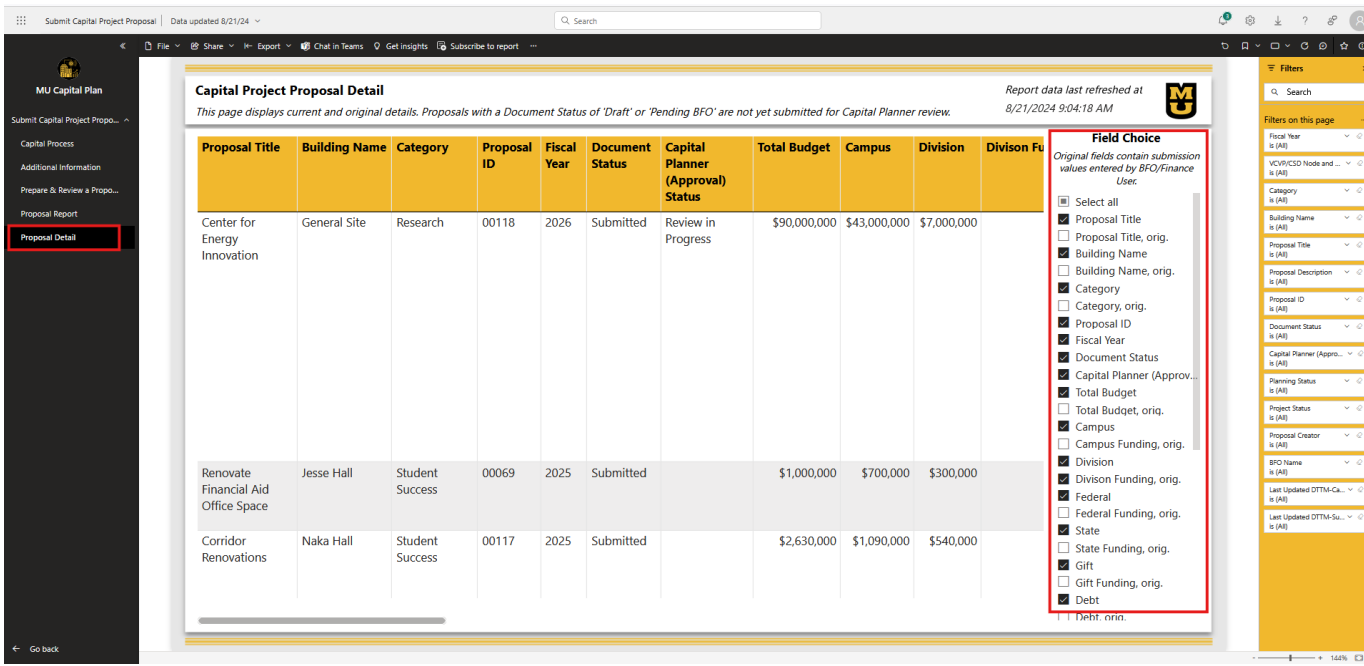
- Project Name**: A text input field with a red border and an asterisk (\*).
- Building Name**: A text input field.
- Category**: A dropdown menu with a red border and an asterisk (\*).
- Fiscal Year Start**: A dropdown menu with a red border and an asterisk (\*).
- Project Summary and Funding Notes**: A large text area with a red border.
- Attachments**: A section with the text 'There is nothing attached.' and an 'Attach file' button.
- Contemplated Funding Sources**: A section with radio buttons for 'Total', 'Division', 'Campus', 'Federal', 'State', 'Gift', and 'Debt'.
- VCVP/CSD**: A dropdown menu with a red border and an asterisk (\*).
- BFO**: A text input field.
- Proposal ID**: A text input field.
- Proposal Created by**: A text input field.
- Last Modified**: A text input field.

The left sidebar shows the navigation menu with 'Prepare & Review a Prop...' highlighted in red. The bottom right corner of the form contains three buttons: 'Delete Draft', 'Submit to BFO', and 'Save Draft'. The status section on the left indicates the current status is 'Editing Proposal'.

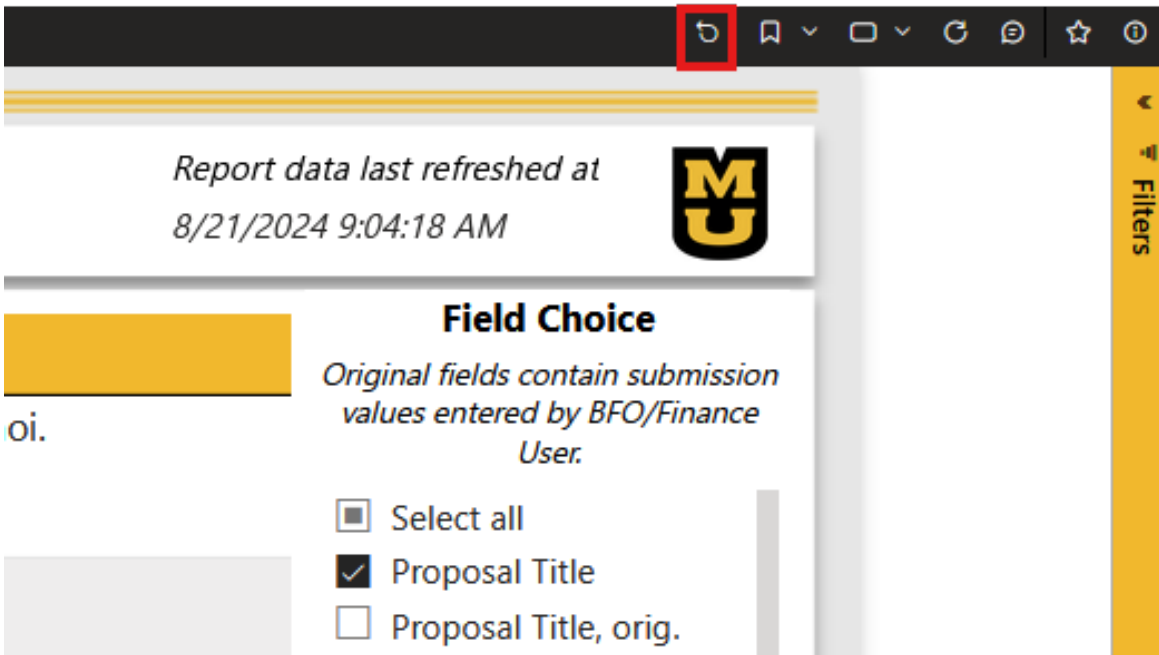
Once you are ready to submit, you may select the **Submit to BFO** button in the bottom right of the screen. The status of your request can be found in the bottom left corner of the screen.



**EDITABLE REPORTS:** Under the **Proposal Detail** report, users can customize which sections of information they would like to view, and export, by going to the **Field Choice** panel on the right side of the screen. If you wish to remove any option from the report, simply uncheck the box next to the item. Check the box to add any option. When you check or uncheck the box, the display will automatically readjust to whichever category you are using.



To reset the field choices to a default view, simply click the 'Reset Filters' button:



## EXPORTING DATA

Report data can be exported into Excel for further analysis by hovering over the table and selecting the ellipsis (...) to open **More Options** in the upper right corner of the data set. *DO NOT use the "Export" link located at the top of the report. This link will export images of the app instead of the data behind the visuals.*

**Capital Project Proposal Detail**  
This page displays current and original details. Proposals with a Document Status of 'Draft' or 'Pending BFO' are not yet submitted for Capital Planner review.

Proposal Title	Building Name	Category	Proposal ID	Fiscal Year	Document Status	Capital Planner (Approval) Status	Total Budget	Campus	Division	Division Fu
Center for Energy Innovation	General Site	Research	00118	2026	Submitted	Review in Progress	\$90,000,000	\$43,000,000	\$7,000,000	
Corridor Renovations	Naka Hall	Student Success	00117	2025	Submitted		\$2,630,000	\$1,090,000	\$540,000	
Renovate Financial Aid Office Space	Jesse Hall	Student Success	00069	2025	Submitted		\$1,000,000	\$700,000	\$300,000	

**Field Choice**  
Original fields contain submission values entered by BFO/Finance User.

- Select all
- Proposal Title
- Proposal Title, orig.
- Building Name
- Building Name, orig.
- Category
- Category, orig.
- Proposal ID
- Fiscal Year
- Document Status
- Capital Planner (Approv...
- Total Budget
- Total Budget, orig.
- Campus
- Campus Funding, orig.
- Division
- Division Funding, orig.
- Federal
- Federal Funding, orig.
- State
- State Funding, orig.
- Gift
- Gift Funding, orig.
- Debt
- Debt, orig.

After selecting **More Options**, click **Export Data**.

The screenshot shows a web application interface for 'Capital Project Proposal Detail'. A table lists three proposals with columns for Proposal Title, Building Name, Category, Proposal ID, Fiscal Year, Document Status, Capital Planner (Approval) Status, Total Budget, Campus, Division, and Division. A context menu is open over the table, with 'Export data' highlighted. The menu also includes options like 'Share', 'Add a comment', 'Show as a table', 'Spotlight', 'Get insights', 'Sort descending', and 'Sort ascending'. A 'Filters' sidebar is visible on the right.

Proposal Title	Building Name	Category	Proposal ID	Fiscal Year	Document Status	Capital Planner (Approval) Status	Total Budget	Campus	Division	Division
Renovate Financial Aid Office Space	Jesse Hall	Student Success	00069	2025	Submitted		\$1,000,000	\$700,000	\$300,000	
Corridor Renovations	Naka Hall	Student Success	00117	2025	Submitted		\$2,630,000	\$1,090,000	\$540,000	
Center for Energy Innovation	General Site	Research	00118	2026	Submitted	Review in Progress	\$90,000,000	\$43,000,000	\$7,000,000	

When asked which data to export, you will need to select **Data with Current Layout**, and then select **Export**.

The dialog box titled 'Which data do you want to export?' offers three options: 'Data with current layout' (highlighted with a red border), 'Summarized data', and 'Underlying data'. Below the options is a 'File format:' dropdown set to '.xlsx (Excel 150,000-row max)'. At the bottom are 'Export' and 'Cancel' buttons, with 'Export' highlighted in red.

Which data do you want to export?

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more about exporting data](#)

- Data with current layout**  
Export this data in the same layout you see now, but without any icons, colors, or other formatting you added.
- Summarized data**  
Export the summarized data used to create your visual (for example, sums, averages, and medians).
- Underlying data**  
The report author turned off this option.

File format:  
.xlsx (Excel 150,000-row max)

Export Cancel

## APP SUPPORT

Still not finding the answers to questions about using the app?

Submit questions to [capitalplan@missouri.edu](mailto:capitalplan@missouri.edu)